

AGENDA
TEXCOM MEETING
Trusts and Estates Section
State Bar of California

March 17, 2007
Downey Brand
Sacramento
9:30 a.m. to 3:30 p.m.

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"Well, we've licked taxes—that just leaves death."

WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR
(30 minutes)

- A. Welcome [HARTOG]
- B. Approval of Minutes of January Meeting [HARTOG]
- C. Report of Chair (15 min) [HARTOG]
Travel Reimbursement
Nominating Committee (10 min) (Potts)
- D. Report of Vice Chair (5 min)
Finance and Budget – Financial Report [STERN]

II COMMITTEE, TASK FORCE AND LIAISON REPORTS

- A. ESTATE PLANNING (50 min) [MACDONALD]
 - 1. Compassionate Choices Act
 - 2. Revocable TOD Deeds
- B. CLRC (55 min) [HORTON]
 - 1. No Contest Clause Study [Kovar]
 - 2. Care Custodian Task Force [Horton]
 - 3. TOD Deeds [Ito/MacDonald]
- C. TRUST & ESTATE ADMINISTRATION (20 min) [BURGER]
 - 1. Increased Limits on 13100 proceedings SB 553
 - 2. Creditors' Claim harmonization AB341 (Hartog)
 - 3. Incapacitated Dentists SB 387
- D. LEGISLATION (30 min) [REGGIARDO]
 - 1. Timeline for TEEExComm legislative proposals
 - 2. Mandatory procedures re legislative proposals

3. Online Bill Tracking legislative information:
www.leginfo.ca.gov/

IMPORTANT GUIDELINES:

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.
- If you agree to testify, be there unless otherwise notified

LUNCH (45 min)

- E. INCAPACITY (60 min) [TONG/COREY]
1. *Lowrie* Bill SB 183
 2. Investment Standards Probate Code § 2590 (Stern/Green)
 3. Annuity Suitability Standards SB573/AB 267 (Corey)
 4. SB 611 (Corey)
 5. Other New Legislation (Tong/Corey/Reggiardo)
 6. Educating Seniors (Kosloff)
 7. Coordination with Office of Emergency Services (Pollard)
 8. Medi-Cal Updates (Stern)
- F. TECHNOLOGY (5 minutes) [GAW]
1. E-Newsletter
 2. Website
 3. Protocols
- G. LITIGATION (10 min) [KOVAR]
1. Mediation Project (Henden)
 2. New Cases (Zabronsky)
- H. MEMBERSHIP & MARKETING (5 min.) [KOSLOFF]
- I. INCOME AND TRANSFER TAXES (5 min) [HAYES]
- J. CEB (5 min) [GOOD]
- K. EDUCATION (10 min) [ALBERIO]
1. State Bar Annual Meeting Programs
 2. Stand Alone programs
 - Advanced Topics
 - Botched Trusts

- 3. 2007/2008 Winter SEI
- 4. Your Legal Rights

- L. QUARTERLY (5 min) [HAND]
 - 1. Manuscripts
 - 2. Electronic Dissemination

- M. ETHICS (10 min) [LODISE]
 - Timeline for Publication of Ethics Guide

- N. NCCUSL (5 min) [GODSHALL]

- O. CONFERENCE OF DELEGATES (5 min) [HENDEN]

- P. NEW BUSINESS

- Q. COMING ATTRACTIONS

**NEXT TEXCOM MEETING
ANNUAL RETREAT
April 27-29, 2007
Hyatt Incline Village**